Streamlining EVV Workflow

Intended Audience: Independent/Non-Agency Providers using Sandata EVV System
NOTE: This webinar will begin 5 minutes after the start time.
Developed February 2022

Sound Test

We are testing sound at this time.

If you cannot hear the sound test, please check the volume on your speakers or listening device.

If you continue to have problems, a recorded webinar will be placed on the Ohio Department of Medicaid's website

Sandata

This presentation is intended for non-agency providers that are using the Sandata Electronic Visit Verification (EVV) system, provided by the state, to record visits.

Agenda

- Review Terms and Definitions
- Discuss Auto-verification
    - What is Auto-Verification
    - Why Auto-Verification matters
- Discuss How to Maintain Auto-Verification
    - Set Up Accurate Records
    - Use the Right Tools
    - Look for Trends
    - Address Claims Matching Errors
    - Review EVV for Help
- Questions

Review Terms and Definitions

Review Terms and Definitions

Non-Agency Provider: A provider that provides care to an individual and records and manages services using EVV

Sandata EVV: The online portal used by non-agency providers to manage Sandata EVV visits and records (https://evv.sandata.com)

Client: An individual who receives services subject to EVV requirements

Review Terms and Definitions

Exception: An indicator of missing or inaccurate information in Sandata EVV

Verified Visit: A visit that does not contain any exceptions

Processed Visit: A visit that does not contain any exceptions, and has been matched with a claim

Review Terms and Definitions

Sandata Mobile Connect (SMC): Sandata's mobile visit verification option; an application that can be downloaded onto a personal smart device or run on a Sandata EVV device

Telephony: Sandata's telephone visit recording option; providers dial an automated line and answer questions to record a visit.

EVV Visit Capture Review

Complete EVV Training → Download Welcome Kit → Log in to EVV Portal → Setup Client Records → Log EVV Visits → Fix any errors → Visits are matched with claims

What is Auto-Verification?

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Auto-verification is when a visit is captured at the point of care with no edits required in Sandata EVV to correct the visit

When a visit is auto-verified, there is no additional work needed in EVV

Note: DODD visits spanning more than one day will need maintenance, in order to match the billing

Visit Capture Review – What is Required

These data points must be captured for the visit to be verified:

- Your caregiver information
  - Username or Employee Santrax ID
- Individual receiving service
  - Client ID or Client Medicaid ID
- Service provided
- Start and end date and time of visit

Visit Capture Review

NOTE: The visit will only be auto-verified if the information on the visit matches records in Sandata

- Example – client record on visit matches the client record in EVV

An auto-verified visit does not always guarantee a matched claim

We will cover claims matching later in this presentation

Visit Capture Review – Visit Maintenance

You should review your visits in the EVV portal to make sure:
- The visit is captured
- The visit has both a call in and a call out
- The visit has all the required pieces of information

Visits with missing or incorrect information may have exceptions
- Visits with exceptions are **not Auto-Verified**
- All exceptions must be resolved for a visit to reach a Verified status

Why Auto-Verification Matters

Why Auto-Verification Matters

- More auto-verified visits = less EVV maintenance time

- Only a Verified visit can be matched with a claim
  - Having more auto-verified visits can increase your claims matching rate with less visit maintenance work required

- Improve overall EVV compliance

Maintain Auto-Verification

Maintain Auto-Verification

Set Up Records in EVV Portal

Have the Right Tools

Look for Trends in Visit Maintenance

Address Claims Matching Errors

Review EVV Help

Set Up Records in EVV Portal

Set Up Records – Clients

The client (individual) record must be completed before the client can be associated with a visit. Please double-check the following fields when creating the client record:

- Client first name
- Client last name
- Client Medicaid ID number
- Payer, program and service
- Service start date
- Payer ID – for individuals with a PIMS ID, and no Medicaid ID yet

Set Up Records – Clients

Set Up Records – Clients

Set Up Records – Clients

Have the Right Tools

Have the Right Tools – Sandata Mobile Connect

Company ID
- 2-10086

Username
- Your email address

Password
- Located in the Welcome Kit Letter

The Client ID or Client Medicaid ID
- Located in the client record
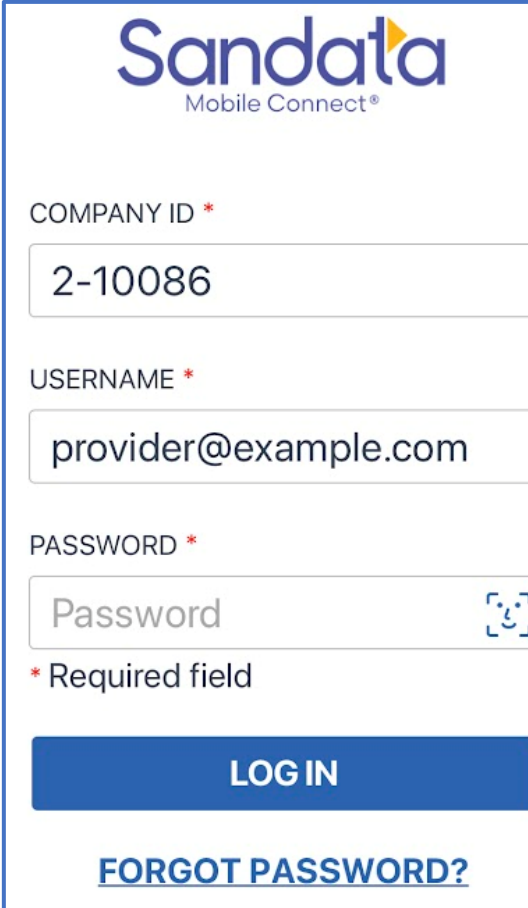
The service being provided to the client
- Located in the client record

Sandata

Sandata Mobile Connect Password Reset

To reset or create an SMC password:

1. Open the SMC app
2. Enter the Company ID and Username
3. Click "Forgot Password"
   - Follow the steps to create a new password

Have the Right Tools – Telephony

Toll free number

- Phone number and a backup number are in your Call Reference Guide, located in the eTRAC Welcome Kit

Employee Santrax ID

- Located in your Call Reference Guide

The Client ID or Client Medicaid ID

- Located in the client record

The service ID, for the call out process

- Located in the Welcome Kit, or posted [here](#)

Look for Trends

Look for Trends

In Visit Maintenance, check visits regularly to address patterns

Look for Trends – Visit Maintenance

In Visit Maintenance, check visits regularly to address patterns

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out
Grayson, Richard	Employee, Maria	RN Assessment (T1001) ●	12/21/2021	09:32 PM	09:34 PM	00:02	09:32 PM	09:34 PM
Grayson, Richard	Employee, Maria	MyCare - HCA (S5125) ●	12/21/2021	09:27 PM	09:30 PM	00:03	09:27 PM	09:30 PM
Grayson, Richard	Employee, Maria	MyCare - Waiver Choices HCAS (T2025) ●	12/21/2021	09:16 PM	09:24 PM	00:08	09:16 PM	09:24 PM

Look for Trends – Exporting Visit Maintenance

EXPORT ▾

CSV

Excel

ROWS PER PAGE: 50 ▾   Show Display Options ▾

« < 1 2 3 4 5 > »   Showing 1 to 50 of 430 entries

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill
●	Employee, Maria	OHCW - Choices HCAS (T2025) ●	02/23/2022	●	04:21 PM			04:21 PM			Incomplete	☐
Client, JT	Rizo, Christian	Passport - PCA (T1019)	02/22/2022	11:24 AM	11:25 AM	00:01	11:24 AM	11:25 AM		00:01	Verified	☐

Look for Trends – Reoccurring Exceptions

Certain exceptions can appear on every EVV visit until the data source for the exception is resolved, preventing auto-verification:

- Missing/Unauthorized Service
- Unknown Client

Let's review how to use data entry to reduce these exceptions

Missing/Unauthorized Service

To prevent future missing or unauthorized service exceptions:

1. Check the service on the client record, and update the service if it is missing or inaccurate

2. Use the service on the client record when capturing visits

Missing/Unauthorized Service

On the navigation panel, click **Data Entry**, then click **Clients**
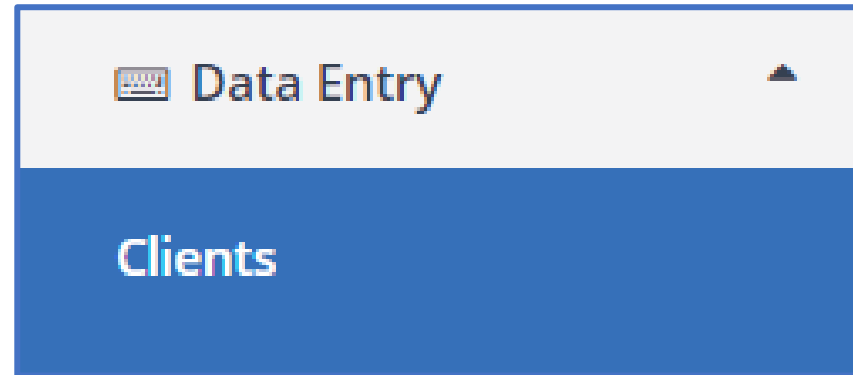
Missing/Unauthorized Service

Search for the client record, then click the pencil icon next to the client's name to open the record details

Missing/Unauthorized Service

Note the payer, program, and service in the client record, or add if the data does not exist, and save the client record if changes were made

Missing/Unauthorized Service – Telephony

If using Telephony, match the service to the code on the [Service List](#)

Missing/Unauthorized Service – SMC

If using Sandata Mobile Connect, all services from the client record will display automatically as options to select

Unknown Client

To prevent future unknown client exceptions, we need to verify that the client record exists, and have the client ID number handy to use for visit capture

Unknown Client

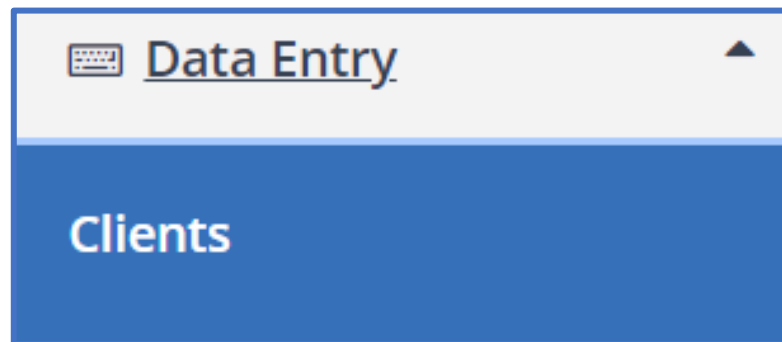When the search results display, note the Client ID number in the middle of the screen

This is the number that you will enter when recording future visits for the client

Unknown Client

TIP: If the client record has not been created, click Data Entry > Clients, then click Create Client in the upper right-hand corner of the screen to create a record.

Unknown Client – SMC

If using Sandata Mobile Connect, enter the client ID number or client Medicaid ID number on the search client screen

Unknown Client – Telephony

If using Telephony, enter the client ID number when prompted

«	<	1	>	»

Last Name	First Name	Client ID
Smith	James	399962

«	<	1	>	»

6. Press the (1) key to "Call In".

Santrax will say: "Received at (TIME). Please enter first client ID or hang up if done."

7. Press the numbers of the client's ID.

Santrax will say: "Received at (TIME). Please enter first client ID or hang up if done."

8. Hang up.

Address Claims Matching Errors

EVV Claims Matching Process

| Provider sends claim to payor | Payor sends claim information to Sandata | Verified visit in EVV changes to Processed status when a matching claim is found | If a visit does not change to processed status, provider can fix the claim or visit |

Address Claims Matching Errors – Examples

Exceptions
- The visit is in Incomplete status and needs errors fixed

Timing
- A claim is sent to payor before a visit is in a Verified status

No Visit Recorded
- A claim is sent to payor before the provider logs a matching visit
- For example, you forget to log a visit, then bill for that visit

Incorrect Information
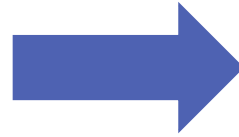- A visit is logged with a service that does not match the claim

Address Claims Matching Errors – How to Fix

There is no visit in EVV for the service date on the claim → Fix the date of service on the claim or use the Create Call button in Visit Maintenance to create the visit

There are exceptions on the visit in EVV (visit status is incomplete) → Fix exceptions on the Visit Details screen in visit maintenance
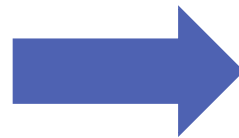
The Medicaid ID entered in the EVV system for the individual does not match the claim → Fix the Medicaid ID number on the claim, or contact Customer Support to update the Medicaid ID number in Sandata EVV
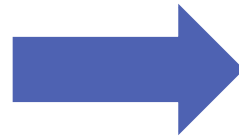
Address Claims Matching Errors – How to Fix

The date of service on the claim does not match the date on the visit → Fix the date on the claim or visit to match the correct date of service
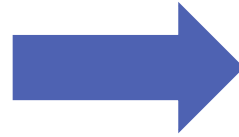
The service code billed on the claim does not match the service on the visit → Fix the procedure code on the claim, or fix the service code on the visit and/or client record to match the correct service provided

The billed units are less than what the visit shows in EVV → Fix the units on the claim or edit the call times on the visit to match the times when the visit happened

Review EVV Help

Review EVV Help

Non-Agency Provider Resources
- Non-Agency EVV Training Manual
  https://medicaid.ohio.gov/static/Providers/EVV/Trainng/Phase3-Non-Agency-Guide.pdf
  Non-Agency EVV Video Library
  https://fast.wistia.net/embed/channel/qkz324kz0p

*Please note: The videos in the EVV Video Libraries do not meet the training requirement for the EVV program. If you have a question about how to meet the training requirement, please reach out to the EVV Provider Hotline at 855-805-3505, or email ODMCustomerCareEmail@sandata.com

Review EVV Help

Provider 1-1 Session with Sandata Trainer and Virtual Office Hours

- https://go.oncehub.com/ODMEVVHelp

ODM EVV Fact Sheet
- Click here to download

Questions

Reach Out with Questions

EVV Provider Hotline:

For help with a device or the EVV Portal, call 855-805-3505 or email
ODMCustomerCareEmail@sandata.com

Hours of Operation:
- Mon-Fri, 7am-8pm
- Sat-Sun, 9am-5pm

ODM EVV Team:

For general EVV questions, email ODMEVV@Sandata.com or leave a voicemail at 614-705-1082

ODM Provider Assistance Hotline:

For help with changing contact information in MITS or claims questions call 800-686-1516